

# OLAQ

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## UX in Oregon Libraries

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# OLA Quarterly

## UX in Oregon Libraries



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# OLAQ

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ON THE COVER

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Issue

Winter 2016

*REFORMA Oregon Chapter*



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# Introduction

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**Joe J. Marquez, OLAQ Guest Editor**  
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Joe is the Web Services Librarian at the Reed College Library. He has written and presented on service design, UX tools, library space assessment, website usability, and marketing of the library. He recently co-authored *Library Service Design: a LITA Guide* and will have a follow-up workbook titled *Getting Started in Service Design* to be published in summer 2017. His current research interests involve service design in the library environment and space usage assessment. He has an MLIS from the University of Washington iSchool and an MBA from Portland State University. Joe is the co-founder of the LUX Service Design consulting firm.

In recent years, UX research has become more commonplace in libraries across the country. This is a good thing. The downside is that UX has become synonymous with the user interface. However, the user experience is more than just a human-computer interaction. The user's experience encompasses the whole experience a user has with the library, whether that be while searching the library catalog for a book, retrieving the book from the stacks, or checking the book out. The user experience is not a single interaction, but rather a series of micro interactions. As a user moves across "interfaces," she is constantly faced with challenges that she must navigate to complete her task successfully. To me, our job as librarians is to make those smaller interactions as fluid and unhindered as possible—in a word, seamless.

As librarians, we are entrusted with the overall experience that our patrons have with the library. And this caring for the experience is not just limited to user experience or web services librarians; it is a task all librarians and library staff should participate in and contribute to. Libraries are tightly coupled systems. They are essentially systems, both cultural and virtual, nested within systems that are dependent upon each other. As we alter the input for one system, we more than likely affect another system farther downstream. As a result, it is essential for all library employees to take an interest in the user experience and listen to our patrons. It is important to take a systems level approach to our work and the user experience. Our patrons are the reason our libraries exist. As our patrons evolve, so must our services and service delivery model. As such, we should work to understand current needs and expectations to make the best possible user experience.



So, why are there bees on the cover? Bees represent a near perfect system. For me, understanding the user experience requires a holistic, systems approach. On the surface, we see thousands of insects buzzing and humming. But as you begin to look closer, you will see tasks broken down and responsibilities divided among members of the hive. And, not only are they tightly coupled as a superorganism, but they are also highly dependent on and coupled with their surrounding environment. As their environment changes, those changes are reflected in the health of the colony. Understanding the user experience is similar to looking at a beehive. To witness the experience, we need to see not only the bees but also the larger ecology in which they exist.

This issue of *OLA Quarterly* is about the state of user experience efforts in Oregon. This collection of excellent articles not only emphasizes the importance of including the users in the design process, but they also stress the importance of actually including users at all! After reading these submissions, I hope that you will see that Oregon libraries value the opinions of their users and are user focused.

What is it like to be a young reader looking for books on princesses? **Steven Engelfried** of the Wilsonville Public Library explains the process that helped the WPL staff to better understand young readers' (and their parents') needs by creating a young readers section based on age and interest.

After analyzing user feedback to help inform their website redesign, **Crystal Trice** shares with us the usability testing techniques that were used at the Washington County Cooperative Library Services.

**Stephanie Chase** of the Hillsboro Public Library has embraced the next level of user-centered research and has taken a design thinking approach to understanding how patrons use the library and what steps to take to make their experience better.

**Aja Bettencourt-McCarthy** and **Dawn Lowe-Wincentsen** of Oregon Institute of Technology have written a great piece on website usability testing. In their article, they emphasize the importance of user testing with A/B testing, card sorting, and focus groups, reinforcing the idea that UX testing is never actually complete.

Nothing beats having a personal librarian. And nothing beats these two articles on separate personal librarian programs at Reed College and the Multnomah County Library system. My colleague at Reed College, **Erin Connor**, explains the process we use for all incoming first-year students; she then shows how reaching out to students in their first year at college can play a role in a successful career in higher education. **Matthew Stefanik**, an MCL personal librarian, shares the experience of participating in a personal librarian program at one of the largest public systems in the country. As a patron of this service while I was looking for books for my oldest son, I can attest to the professionalism and expertise I experienced as a user.

**Valery King** of OSU Libraries and **Meggie Wright** of Lane Community College share the importance of ongoing UX assessment to keep up with an evolving student body, reminding us not to forget the physical environment as a touchpoint. 



# Rethinking Shelving:

## Making Your Children's Collections User-Friendly

by **Steven Engelfried**  
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STEVEN ENGELFRIED

Steven has been a Youth Services Librarian for just over 30 years, including the last six with the Wilsonville Public Library. His favorite youth services activities include puppet shows, collection development, and reading all those great books and talking with kids about them. He recently became Library Services Manager, which means working with programs and collections for adults, as well as kids and teens.

It was the princesses that did it. About five years ago it seemed like every day a different little girl would come up to the children's desk and want help finding picture books about princesses. I could do pretty well with trucks and trains because I knew enough books by author and could jump from Barton to Crews to McMullen until I found one. But I only knew a few princess books, and they were always checked out. And that was the final straw that led us to create our "Picture Book Topics" section. Soon we had a new "Pink" section filled with princesses, mermaids, and stories about girls who like sparkly things. It became and remains one of the most heavily used collections in the library.

We've added other new sections to our children's collection in the past five years, including leveled early readers, a "Non-Fiction Series" area, and fiction staff picks by grade level and genre. All of the changes were spurred by asking a few basic questions about what happens at the Children's Desk:

- How do kids (and sometimes their grown-ups) describe the books they want?
- Do we arrange the collection in ways that match those descriptions?
- If our collection arrangement doesn't match a user's questions, can we change it?

### Picture Book Topics

Picture Book Topics was our first big response to these questions. Along with princess-related topics, we identified transportation, dinosaurs, and construction as other frequent picture book subject requests. We decided to start with those four. We weeded and shifted to create some space just before the "A" authors. Rather than re-cataloging and re-labeling existing copies, we purchased new copies for each section, averaging 60–80 copies as a start-up collection. All four were instantly popular, with "Pink" leading the way. They definitely solved my own princess picture book problem noted above. Equally importantly, they gave kids as young as two or three a starting





Picture Book Topics

We also learned that the Picture Book Topics section could support our efforts to share early literacy information with adults. When we talk about the value of singing to kids or vocabulary-building that happens when children tell stories, we also guide them to our topical sections featuring “Songs and Rhymes” and “Wordless Books.” Sections on “First Experiences” and “Behavior” address some of the challenging phases of childhood (and parenthood). Soon we will also add simple non-fiction titles to selected topics.

Books in the Picture Book Topics collection now circulate almost 40 percent more frequently than books in the regular section. About 35 percent of picture books are in the new section, and that will grow to 40–50 percent over time. The circulation statistics are fine, but we’re more excited about the way that Picture Book Topics have actually changed the way kids and grownups select books.

### Early Reader Levels

Leveling our Early Reader collection was a more straightforward process, but equally important when it comes to what our patrons want from these books. Five years ago this collection was one continuous run of books, alphabetical by author. A true beginning reader like *Hop on Pop* by Seuss might sit next to Erica Silverman’s *Cowgirl Kate and Cocoa*, a much more challenging title. The books had number labels on the spine to suggest a reading level, but that wasn’t enough: We decided to break up the collection into four leveled sections.

Assigning levels to the 2,500+ titles seemed daunting at first, but turned out to be quite manageable. We paid no attention to the levels publishers put on their books since those clearly vary wildly. We disregarded mechanical approaches like word counts and Lexile numbers. Instead, we created simple guidelines and, most importantly, didn’t worry too

place where they would find “their” kind of books. Watching a four-year-old eagerly pull out one dinosaur story after another, then walk away with five or six, all chosen on his own was something we were not used to seeing.

Over the next few years, we added more topics. We always kept children in mind as the main audience, but we realized that the topics have strong parent-appeal too. No child has ever asked for a “classic,” but parents looking for a good old reliable book to share with their young one really appreciate having them grouped together. “Bedtime” and “ABC/123” are other topics that draw the grownups.





Leveled Early Readers

much about it. The “don’t worry” part goes against all of our cataloging training, but in this case, we just had to let that go. So what if we assign a “3” to a book that probably should be a “4?” That’s fine. We want a few more challenging books among all the other “3s”; we also probably want a few high “2s” in there for readers who have just moved up to that level.

Dividing the books into levels makes choices more efficient and more interest-based. If a young reader doesn’t have to worry so much about reading level, he can focus more on interest and appeal. The child browsing the “2s,” for example, can look at *Super Fly Guy*, *Hop on Pop*, and *This is Spider-Man* and feel confident that the one he wants to read will also be one he can read.

We received strong positive feedback from kids, parents, and teachers about the leveled early readers, and we value that over circulation. With a collection like Early Readers, in fact, tracking check-outs may be a misleading measure of the user experience. Without separated levels, a patron looking for five good books may wind up checking out ten or fifteen, assuming that many of them won’t be right for the reader. Effective grouping, however, can lead readers directly to the books that are right for them, which could mean they actually check out fewer items at each visit.

### Fiction Staff Picks

The success of levels in Early Readers led us to rethink Children’s Fiction, though we had to get past some personal barriers for our next step. The idea of dividing children’s books by age level goes against everything we learned in library school. ALA even has a position





Fiction Staff Picks by Grade Level

paper on the perils of labeling books with reading levels. On the other hand, we knew from observation that the user experience for kids is impacted, at least partially, by their age.

When we do reader’s advisory with children, one of our first questions is typically “what grade are you in?” It’s not the *only* thing we want to know, and we recognize that fourth graders vary widely in their abilities and interests, but it’s still a key piece of information. So why not put a bunch of fourth-grade books together in one location? Not all books at the fourth-grade level, but a big enough handful to serve as a starting point.

We created five simple “Staff Picks by Grade Level” shelves: one for each grade from three to seven. Children’s staff members keep the shelves full by adding personal favorites and popular titles. Copies are not permanently assigned to these shelves but rotate on and off. And once again, when it comes to deciding which shelf a particular title should go on, we play it very loosely. *The One and Only Ivan* by Katherine Applegate has spent time on the 4th, 5th, and 6th-grade shelves, for example, and it appeals to that wide range of readers in different ways.

Our “Staff Picks by Genre” section was also inspired by reader’s advisory transactions. Along with grade level, we also usually ask some sort of “what kind of book do you like?” question. We’ve all utilized printed booklists, genre spine labels, and online resources, but why not pre-select a bunch of good mystery books, put them in one spot, and go there first when the answer is “I like mysteries.” Our genre staff picks sit right next to the grade level shelves at the beginning of juvenile fiction. As with the grade level section, children’s librarians select the titles and keep the shelves filled. This means the books chosen usually have high appeal and are likely to be checked out. At the same time, staff members improve their knowledge of the collection during the process of selecting and anticipating what readers might go for.

I’m not sure whether staff or patrons benefit most from having our staff picks shelves. Either way, the grade level and genre sections make a great starting point for the fiction reader who doesn’t have a particular author or title in mind but just wants a good book.



### Non-Fiction Series

We initially struggled to find effective ways to feature non-fiction children's until we went back to that key question: "How do kids ask for books?" With non-fiction, the Dewey Decimal system often provides the answer: "Where are the dinosaur books?" and "Do you have poetry" are no problem. But what about the readers who love "Dragonology" (J398s) and "Egyptology" (J960s), not because of the subject, but because of the format? Or the kids who want to read every single one of the "Who Was?" biographies? Yes, they're all in the J920s, but why make them peruse dozens of shelves when they can all fit on one?

Our response was to create a "Non-Fiction Series" section. We selected several popular series ranging from old favorites like "Eyewitness Books" to "Basher Science" and other more recent sets. Following the strategy used with Picture Book Topics, we opted to add new copies rather than reassign books from the regular Dewey range to this new section. We still wanted readers to find "Fly Guy Presents—Insects" along with the other insect titles in the J595s, but also find that same title next to a bunch more books in that high-interest series.

After starting small with just eight series, we currently have over twenty-two series on these featured shelves. Books in this section have a turnover rate almost three times higher than regular non-fiction. It has high appeal for browsers who are interested in facts and information but don't have a particular topic in mind. We've also seen an unanticipated benefit in helping readers who may struggle with reading non-fiction. Reading non-fiction books can be challenging for many readers, since books vary not only in reading level but in format and structure. A less confident reader who manages one National Geographic Reader or Gail Gibbons book knows that the next in the series will be equally accessible, so grouping them together provides some kind of leveled reading access for non-fiction.

### One Approach Doesn't Fit All

The changes we've made to our children's collection happened over time. In every case, we started small, watched how people responded, and adjusted accordingly. Not every idea worked out, but we gave ourselves the freedom to try things out and switch directions if needed. We're not sure yet what future shifts we will make for child readers, and we're in the process of considering similar, but different changes to adult collections. Whatever comes next, we'll keep using the same basic strategy of observing what our users want and how they ask for it, then try to figure out a way that our collection arrangement can match the way they're thinking about books. 



# Want to Make Your Website Better? Ask a Librarian.

**by Crystal Trice**

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CRYSTAL TRICE

Crystal is the Training and Projects Librarian for Washington County Cooperative Library Services. She has been a librarian for 18 years, on both the East and West coasts. Ms. Trice also teaches seminars for librarians interested in creating makerspaces. She can be reached at [CrystalT@wccls.org](mailto:CrystalT@wccls.org).

Raise your hand if you have served on a committee in your library. If your hand isn't raised, just give it some time ... libraries definitely like committee work. For instance, I recently had the opportunity to work with a committee consisting mostly of librarians. When the committee's goals were accomplished, my non-librarian coworker commented that "Librarians sure have a lot of opinions."

Since this article is about usability testing, and is written by and for librarians, let's test his hypothesis. Let's also test a few other hypotheses about librarians while we're at it. (Disclaimer: In this article, "librarians" include staff who work in libraries, and has nothing to do with degrees or job classifications.)

Washington County Cooperative Library Services (WCCLS) is a Cooperative of 13 member libraries and two special libraries, each uniquely governed and operated. WCCLS is a primary funding source for member libraries, and our WCCLS "Office" provides other support such as daily courier deliveries, cataloging coordination, and e-book collections. The WCCLS website and Extranet are two other ways the WCCLS Office supports member libraries in Washington County. The WCCLS Extranet is a repository of policies, procedures, and committee meeting documents. It also includes training and promotional materials for WCCLS resources, as well as opportunities for sharing ideas.

## **Hypothesis #1: Librarians have a lot of opinions.**

Nod your head if you agree. Shake your head if you disagree. (If you're shaking your head vigorously, you might want to reconsider your answer.)

Full disclosure: I have been a librarian for 18 years. My current WCCLS job title includes the word "librarian," but my day-to-day work focuses on duties related to being half of a two-woman web team. In the past two years, the web team has rebuilt our public



website ([www.wccls.org](http://www.wccls.org)) and our staff Extranet from scratch. These rebuilding processes included usability testing, including gathering opinions and ideas from member library staff.

In rebuilding our public website, we conducted usability testing, with staff and with our patrons. (For full details, read this article from *The Active Librarian*, <http://bit.ly/2iTpdPb>. [Trice, 2015]) In our usability testing, we learned that our member library staff are thrilled to give opinions whenever asked. Each time we've requested responses to surveys, click tests, or card sorts, we have been amazed at how many library staff members share their valuable time and insights with us. For example, the staff survey we sent at the beginning of our Extranet rebuild process had 98 responses, which is almost a quarter of all staff across the county, and approximately a third of Extranet users.

Those 98 opinions told us that what staff liked least about our previous version of the Extranet was the navigation (40%) and search ability (28%). Based on that survey, our mission for the new Extranet was clear: make the new version better organized, and make it easier to find things.

**VERDICT:** *True.* Never argue with a librarian; they know too much.

### Hypothesis #2: Librarians are good at organizing things.

But just how do you organize over 1,000 pages and 3,000 files? Through usability testing! We conducted two types of usability testing to wrangle Extranet content, with the expert aid of librarians at our side. Our cooperative structure means our Extranet holds a unique blend of documents and materials that are tricky to categorize. Part of that difficulty comes from nomenclature. The WCCLS Office might use different names for things than our individual member libraries, and we wanted to find out how member library staff would group and name content.

To accomplish this, we used a kind of usability testing called “card sorts.” In a card sort, participants look at sample content from across a website written on physical cards or the online equivalent. They place the sample content into groups and give names to each grouping. We used the online product Optimal Sort to gather responses for two different card sorts. (See figure 1.)

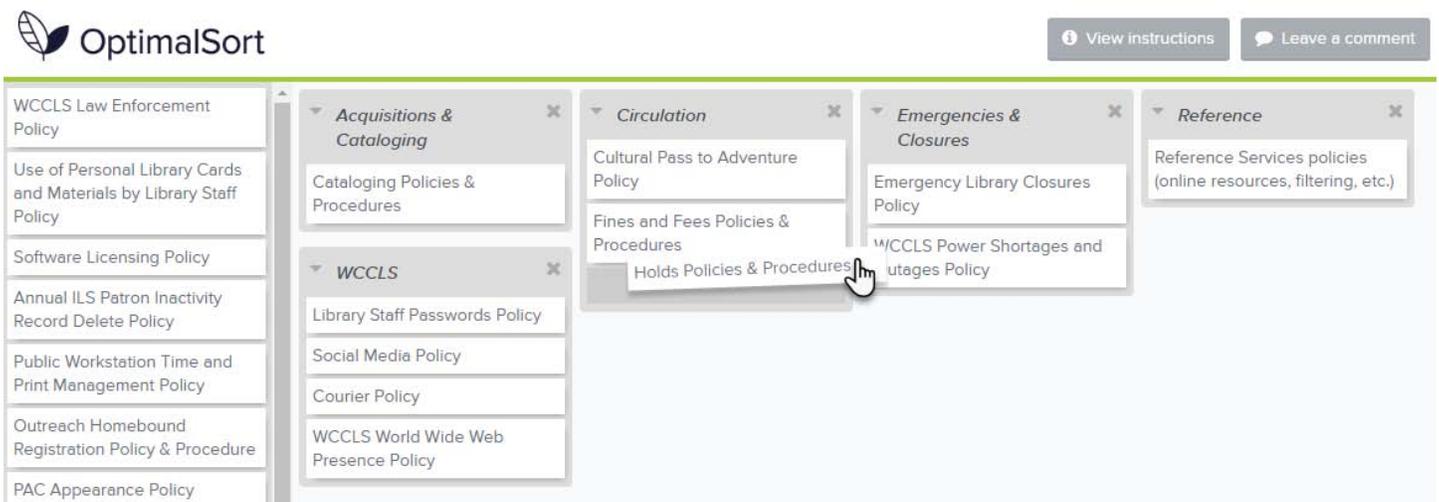


Figure 1

One card sort focused only on Policies and Procedures. Since we have so many P&Ps, we wanted to simplify the categories to help people find the one they need without being overwhelmed. The second card sort focused on any other content on the Extranet—everything from Wi-Fi statistics to storykit information. Twenty-seven brave souls completed this tough exercise for us. Their work helped us reduce the Policy & Procedure categories to five, and helped us create categories for an actual menu on the new Extranet for easier navigation.

Our next round of usability testing was designed to assess our initial groupings and menu names. We had 50 participants in the click test, which is just what it sounds like. Participants click an image of a website or menu to show where they would look for sample content. (See figure 2.) We used a companion online product called Chalkmark to gather responses and help with analysis. The results of this test showed us how to improve our menu names, as well as where we needed to move content from one menu area to another. Sometimes the needed changes were blatantly obvious once we did click testing. For example, we moved the “how to write meeting minutes” guide to the Agendas & Minutes menu area.

**VERDICT:** *True.* Librarians have novel classification skills.

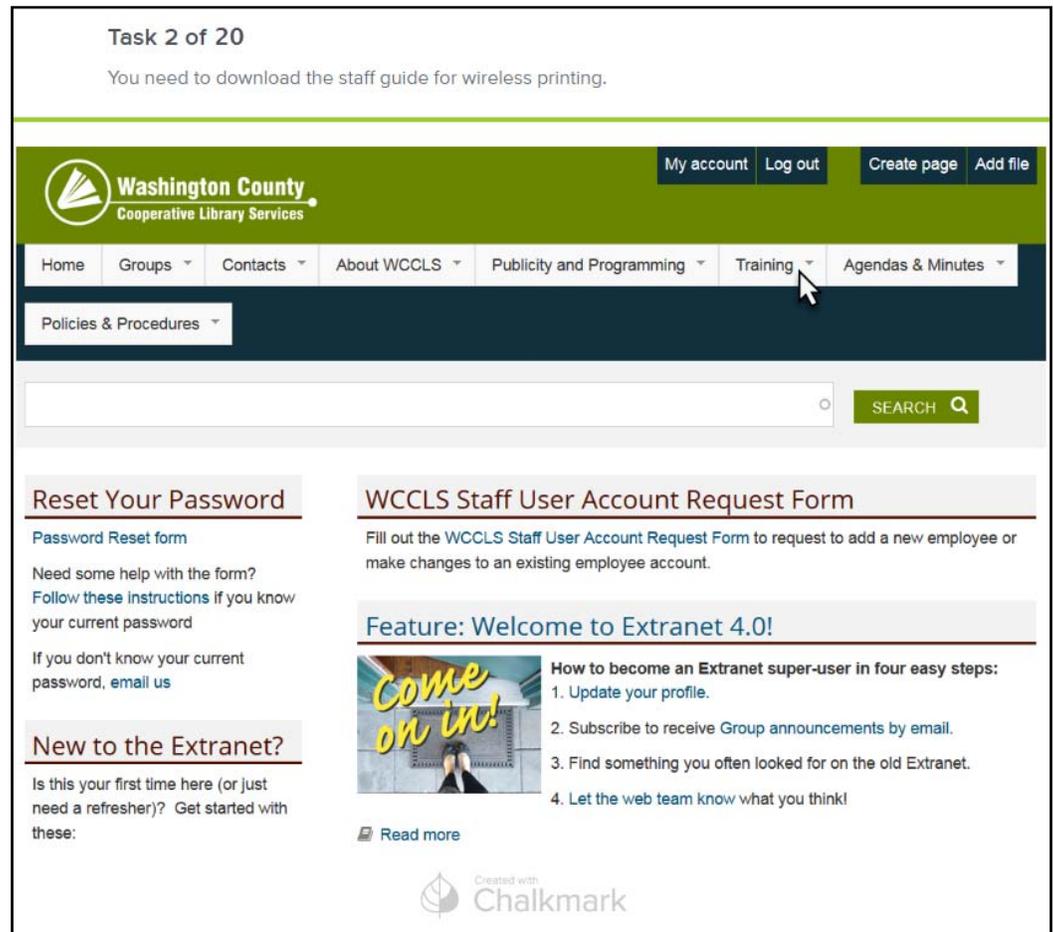


Figure 2



### **Hypothesis #3: Librarians are expert searchers.**

At this point in our development process, we were confident that our navigation menu was ready for staff to use. But what about searching? About half of our survey participants shared that they prefer to search instead of navigate Extranet menus, but many also shared that the search wasn't working the way they expected it to.

We decided to do “rocket surgery” usability testing to test search functionality. Usability testing guru Steve Krug outlines exactly how to conduct this type of do-it-yourself live usability testing in his book *Rocket Surgery Made Easy* (2010). DIY testing is most helpful for sites that are well developed and in need of fine tuning. Research shows that 80 percent of a website's problems can be found by only five testers, a small recruitment for big returns! (Nielsen, 2000)

We developed a set of 20 search scenarios around content people search for on the Extranet. For example, “You are working on programming for your library and need demographic information for your area of Washington County,” or “You need to review the Cultural Pass policy in preparation for a meeting.” During testing, we used a laptop that recorded mouse clicks and voice through QuickTime. After the introductory script adapted from Krug's book, a facilitator read each search scenario and asked the participant to think out loud while searching. Each session took approximately one hour. The web team watched each of these recordings later, pausing to take notes in a spreadsheet and talk about potential solutions to issues found. Watching the recordings took approximately two hours each.

One observation we had during the testing is that librarians seem to learn how to search interfaces by searching. By examining their search terms and results, our testers intuitively adjusted their search strategies to get better results the next time.

**VERDICT:** *True.* Librarians are the original search engine.

### **Hypothesis #4: Librarian opinions should always be followed.**

Conducting only a handful of live usability sessions gave us sizable results. In fact, we made a total of 39 changes to the Extranet based on the feedback of five people. Some changes were small, like changing page names for clarity or cross-linking between content. Some changes were big, such as adding new content we didn't know was needed or changing the order of sort and facet search options. We focused on search ability for our live sessions, but the usability benefits we gained were not limited to search improvements. In particular, the Extranet homepage was simplified with the addition of call to action buttons, such as “Change your password.” Additionally, the homepage content was re-ordered to match the information needs of staff testers.

The staff feedback we received after launching the new Extranet was quite positive. Without asking specifically about the two big pain points from the “before” survey (navigation and search), our “after” survey shows that many staff mention findability as what they like most about the new Extranet. (View staff comments as a word cloud in figure 3.)

**VERDICT:** *True.* Librarians have thousands of right answers ... if only people would ask the right questions.



In summary, all of our librarian hypotheses are true. However, librarian opinions are largely untapped in the realm of library web presences. Perhaps it's time to launch some usability testing for staff in your library ... who knows what you'll learn!

Want to share your opinion about this article? Please send me an email. I would enjoy hearing from you. 

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Figure 3



# Design Thinking in Action: Changing the Public Service Model

by **Stephanie Chase**

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STEPHANIE CHASE

Stephanie is Director of the Hillsboro (OR) Public Library. Prior to Hillsboro, Stephanie coordinated service strategies to libraries for BiblioCommons and was the Director of Library Programs and Services for The Seattle Public Library. Stephanie is the founder of the Green Mountain (VT) Library Consortium, a 2010 *Library Journal* Mover & Shaker, and a founding member and current chair of the LibraryReads Steering Committee.

While the concept of design thinking is not new, in the past several years, it has emerged as a concept of interest for libraries, placed firmly in our sights through a high-profile collaboration between the Chicago Public Library and DOKK1 in Aarhus, Denmark, supported by the Gates Foundation.

Design thinking—or human-centered design, as it is also known—is most closely associated with design consultancy firm IDEO, and is simply a method of creative problem solving that starts with reaching a goal, rather than a solving a problem, in mind.

Stanford's d.school is also an active participant in the design thinking space; in an article about Stanford's work, student Karen Ladenheim described it as “a tangible scaffolding through which [one] can approach problem solving,” and using the example of redesigning scissors to illustrate:

“If I told you to design a better pair of scissors, you would immediately think of something with a handle and two blades that fit into your hand ... [b]ut if I told you instead to find a better way to cut paper, then maybe you would imagine something that was larger and with only a single blade, or something that rips paper, or something more similar to a hole punch.”

The design thinking process is generally considered to have seven steps, which were first proposed in Herbert Simon's 1969 book *The Sciences of the Artificial*:

1. Define
2. Research



3. Ideate
4. Prototype
5. Choose
6. Implement
7. Learn

Moving through these seven steps, a team is encouraged to think broadly and creatively of ways to reach a goal. For the Hillsboro Public Library, our intention was to use this process to develop a new collaborative and patron-focused service model. In Hillsboro, we knew we wanted to reduce service points and make it easier for patrons to get the help they needed in whatever form they preferred. We also knew that we needed to be clearer about the roles of our Library Assistants and our Librarians, and to find ways for the staff to work together, rather than be siloed. Rather than thinking about our current service model as a problem that needed to be fixed, we wanted to explore ways to improve the patron experience and bring more value to staff.

At Hillsboro, we enlisted a variety of staff to take part in this brainstorm, drawing from our Strategic Initiatives division (essentially our “R&D” department) and our newly formed Innovation Team. The Innovation Team is one of Hillsboro’s staff-led teams, a committee type that consists of five to seven staff from across all classifications and which is self-led, with only a management sponsor (as opposed to a manager in a leadership role), who serves to clear roadblocks, obtain resources, and ensure the activities of the team consistently align with organizational and municipal goals and initiatives.

Our Innovation Team acts as our process improvement crew, and we knew the design thinking process would be an important one to have in their toolbox. We contracted with Dri Ralph, a facilitator from the Seattle area familiar with libraries and who has experience with Six Sigma and the design thinking process. Dri led the participating staff in an all-day session, using the IDEO Toolkit developed for libraries as a guide.

We began the day moving quickly through the seven steps, using the Toolkit to brainstorm in small groups the ideal commute for a variety of animals, including a hummingbird. It may sound fanciful, but it was a perfect way to get participants thinking creatively about a problem as well as holistically about the user—in this case, a tiny, fast bird that needs a lot of fuel.



Courtesy Dri Ralph



Following this opening exercise, we moved on to the main charge of the day, which was to move through the design thinking process with this question in mind:

- How might we create a collaborative service model on the first floor of the Brookwood Library?

We spent the day refining our understanding of the issues, in order to really define the goal we were working towards. We did this through a variety of exercises, exploring our current barriers. Barriers included:

- a large number of reference and informational questions that end up at our coffee court, as the staff there are the most immediately visible upon entering the Brookwood Library location;
- the challenge of the desk configuration at our Shute Park Library location;
- and the main service point being to the left, rather than the right, at Brookwood and additional service points hidden from view.

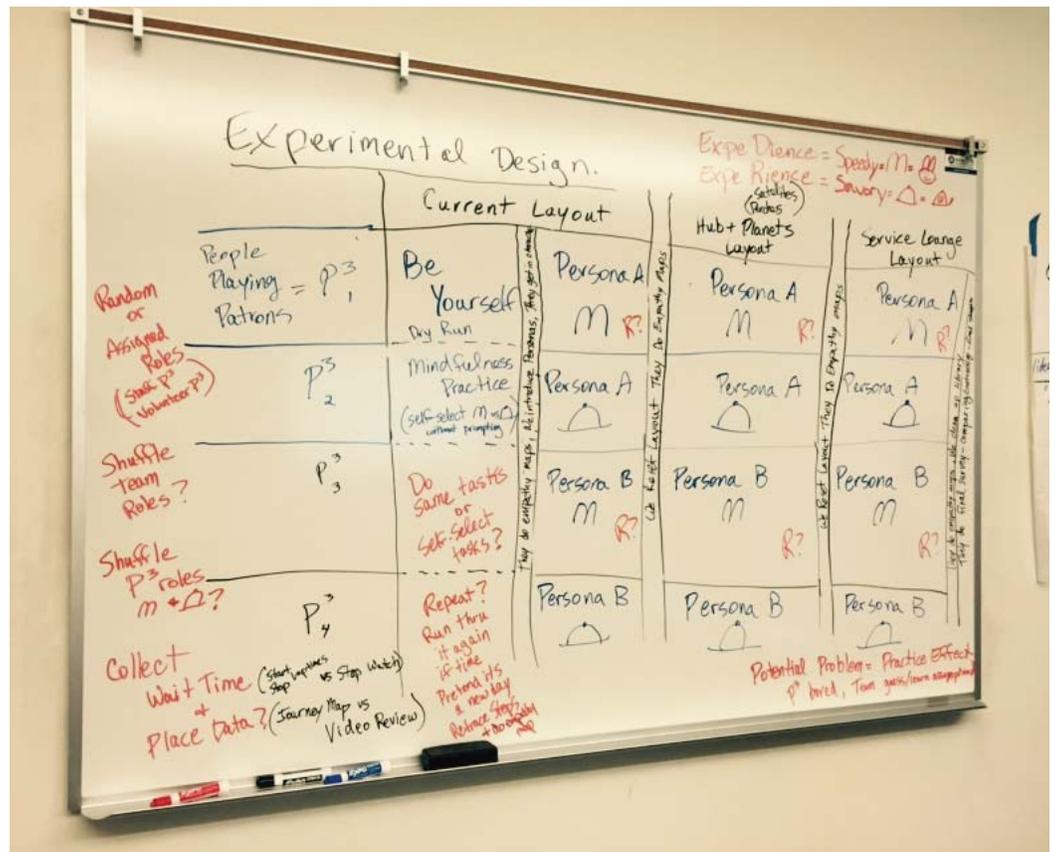
We undertook research before the design thinking day to help inform our work; this is how we learned about the questions going to the coffee court. During the day, we also moved through some or all of the seven steps as interesting solutions arose, researching in real time by observing in the Brookwood Library patron behavior around the coffee court, ideating around how to solve the barriers to access created by the physical layout of the lobby, prototyping using Duplos for new lobby layouts, and choosing from the prototype ideas which one we were going to move forward, which now sits as a developed plan from our architect, ready to implement when the time is right.



Courtesy Dri Ralph



Defined problem in hand, and potential ideas to implement at the ready, the Innovation Team followed up on the research they had done on library use, developing a series of personas representing typical patron groups at the Brookwood Library, as well as investigating the most common questions asked at our current service points. The Innovation Team identified which questions had the potential to be answered through self-service, rather than staffed, options, and developed a series of three different ideas to implement on a special prototyping day. Each option explored different levels of self-service. Throughout this process, we called on our City’s Process Improvement officer, Steve Pleasant, who was an active participant.



Designing the prototyping experiments, courtesy Hillary Ostlund

The Innovation Team lead the prototyping day on a Sunday morning before the Brookwood Library opened, putting the call out to our large volunteer group for people to take on different personas. Cardboard models and temporary signage was made to help transform the library for each of the options.

The Innovation Team ran four rounds of testing. First, each volunteer used the library as themselves, getting used to the process, the questions and observations they had to answer during the test rounds, and participating in a debrief. We also took a measure of satisfaction after each round. Then, each volunteer received their persona and what was essentially a quest for each round; their persona stayed the same, as did what they were looking for; only



how much time they had to spend on meeting their information need changed (for example, that they had the time and desire to chat with staff, or that they were in a rush). Staff for each round stayed the same, dressed in black with obvious name tags.

What we learned is that people, in general, were very satisfied with the library, because they had developed their own patterns of usage. However, satisfaction dipped considerably when they had to adopt new needs and new personas, a much more accurate and useful representation of the average user experience. We learned that patrons did not know where to go to ask questions or find high-use collections, and that our options for self-service were hidden. We learned patrons want to do more for themselves, but also very much appreciated easily and clearly seeing how to access staff if they have a question. We also learned that very hands-on, concierge style service—the Apple Store model—was confusing to people, who are perhaps used to the self-education model of public libraries.

As a result of the prototyping day, we implemented several changes recommended by the Innovation Team and their staff colleagues, including:

- Moving the self-check out machines together into one area, right at the front of the lobby;
- Adding uniform options for staff, including logo shirts, “Ask Me” buttons, and “Ask Me” aprons;
- Concentrating all staff service into a central service point, which staff named the “Hub” at Brookwood and the “Hive” at Shute Park.

We also learned there were many aspects to self-service that needed to run through the design thinking process on their own, including how patrons find and access holds and how we could ensure the availability of holds on the holds shelf, since notification of a hold often happened significantly before the hold was actually available for pickup.

The concept of design thinking can seem overwhelming, but as we have learned through this process, it is an effective tool for involving staff in helping define outcomes and in taking part in creative problem solving to reach those outcomes. 

### Further Resources

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# How Do Undergraduates Research? A User Experience Experience

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DAWN LOWE-WINCENTSEN

## Introduction: Inspiration for the Research

In 2010, the Oregon Tech Library moved to a new campus-wide content management system. This change, and the popularization of products such as LibGuides and Library a la Carte, inspired Oregon Tech librarians to develop new subject guides. As a means of participating in the new system and of saving money, the library created a subject guide format to be used on the web content management system, Sitefinity. The guide format was designed by a committee with librarian and library staff input, but without assistance from students—the target audience. As a result, the guides that were developed tended to be text heavy and riddled with library jargon that did not make sense to students. In addition, the guides were difficult to edit, resulting in dated content and frequent broken links. While instruction librarians would push relevant guides in their classes, they never caught on among students.

The challenges that Oregon Tech librarians encountered mirror difficulties that librarians and students have had with subject guides at other libraries. Reeb and Gibbons (2004) point to research conducted at a variety of institutions (Duke University, University of Rochester, Wright State University, and MIT among others) that found students had difficulty locating and using subject guides. These findings were reemphasized by Ouellette (2011) whose student interviews confirmed that they “[students] do not use subject guides, or at least not unless it is a last resort” (p. 442). In addition, Ouellette (2011) noted that students avoided complicated subject guide tasks and tabs in an effort to streamline their search experience and access the materials quickly. Students expressed a preference for guides that had, “clean and easy to use designs” (p. 444) and found cluttered guides confusing and difficult to use. The importance of ease of use is supported by Jackson and Stacy-Bates



(2016) who note that students are used to relevancy rankings in search results and might expect similar structures, focused on simplicity in subject guides.

By 2014, Oregon Tech librarians were aware of problems with their subject guides and had begun to consider technology and formatting changes to make the guides more accessible. Two librarians attended usability courses (through Library Juice Academy and Acquia) and decided to employ usability research methods to design a guide format that would better meet student needs.

### **Methodology: Types of Studies Used**

A variety of methods were used over the course of about a year providing diverse data and the opportunity to collect data from different student participants. The librarians began by holding three focus groups on two different campuses with a total of 13 student volunteer participants. The focus groups began with a series of prompts to encourage a discussion. These prompts were general to the research process. The librarians took notes and followed up, when necessary.

Librarians then took the initial data from the focus groups and created a mockup of a new guide. The new subject guide mockup and the existing version were shown to three classes in an A/B test. Despite displaying the same content, more than 50 students voted, and only one indicated a preference for the guide developed in 2010. One librarian took notes on the comments students provided about the tests.

Using the information from the focus groups, A/B tests, and a librarian led card sort, as well as campus and library statistics, a group of three librarians developed a persona, or representation of the library website's average user. The persona student was a junior level transfer student who was mostly taking classes at the 300 level or above in their discipline, but still had the occasional general education or lower level course to complete. The persona student commuted to campus and was most interested in the library when they had a specific assignment and wanted to be able to do things online. A small group of librarians then began to evaluate the library's subject guides from the perspective of the persona and developed a new study guide format.

### **Limitations and Issues**

The library's initial timeline allowed for a two year testing period. Due to an upgrade of Sitefinity in 2013 and the resulting changes, as well as library staff changes, focus groups did not begin until the second planned year. This pushed back the research timeline and limited the scope of the research. Oregon Tech Library's usability research also faced limitations due to small sample sizes and limited staffing.

Due to staff and financial concerns the library was limited to a single librarian who moderated and took notes at each session. In addition, some students were unwilling to provide the consent necessary to record the focus group discussion. Both of these challenges may have limited the librarians' ability to effectively capture all of the information presented during the focus groups.

Budget constraints also prevented the library from offering incentives for participation. Although snacks were provided, two focus groups had only two people attend. The third focus group was attended by an entire communications class as part of a class assignment. A



fourth session was scheduled, but no one attended. While this small sample size may have limited test results, it provided an adequate starting point for initial subject guide changes.

### **Results: What We Found and How Information Was Applied**

The proposed new study guide format was directly informed by the usability testing results. Some of the major themes of the findings were:<sup>1</sup>

- Desires for easily discoverable, fast content
- Videos to learn how to use resources and do research
- An understanding of bias, but difficulty in identifying it
- An understanding of authority, but not on how to determine it

The first two themes shape the top half of the new subject guides. The first item on the subject guides is a top resources box. This is a list of three to five electronic resources most relevant to the subject at hand. By dividing the resource list, librarians can better assist students who are looking for a quick way to find sources for an assignment while still providing the research guidance necessary for more in-depth research. In the second part of the subject pages, users find videos on how to use the top resources or how to build searches and other related topics. Students report using videos to meet a variety of information needs because videos are "easier to understand and more entertaining."

The latter two themes have been used to create videos and other learning aids, as well as helping librarians focus instruction sessions. Student focus group participants regularly mentioned struggling to differentiate between opinion and fact and to identify credible sources when conducting research. In addition, all guides adopted short, focused text to explain resources without losing student attention.

The A/B tests were overwhelmingly in favor of the top resources and video layout. Most commenters liked the graphic layout and videos in the new guide's format. The one commenter who liked the original guide better was a nontraditional student returning to school and had previously used similar text finding aids.

In addition to reevaluating the subject guide format, a committee of librarians also completed an electronic card sort of the entire website with the previously developed persona in mind. This led to the deletion of more than 50 pages. One major change was to have the list of electronic resources on the same page as the subject guides. This provides one path to get to the majority of electronic resources students will need to use and faster navigation. In addition to the page reduction, many pages were also streamlined, and legacy content was hidden from public view or deleted.

Finally, the library opted to move subject guides onto a new platform. Sitefinity is still the university content management system. While it does have many features, it is not accessible to all librarians creating content for subject guides. The library had previously purchased SubjectsPlus, an open source subject guide management system and transitioned subject guides onto this platform as a part of the reformatting.

### **New Subject Guides**

The final design of the new subject guides that the Oregon Tech library launched in 2015 was very close to the B (or new) version used in the A/B tests. It includes the top resources and videos sections that were mentioned previously. Components that were added to the



<sup>1</sup> See appendix for comments affecting these findings

original design include a FAQ section, where content creators select from a collection of FAQs and a subject contact. This is all on the first screen (or above the fold) on a traditional laptop or desktop. Content for below the fold, or where a traditional screen user would need to scroll down, is flexible based on the subject but may include narrowing topics, further resources, and/or more videos. A compromise between the committee and staff was to allow more freedom in content development and layout below the fold. All guides also include a last edited date in the bottom right corner for staff tracking purposes.

With staff development and assistance from IT students, SubjectsPlus was developed to host the new guides. All content creators were given accounts and the responsibility to create and edit their own guides. When building new guides, content creators follow the guidelines listed above as well as a detailed handbook for using the software. In addition, a tracking spreadsheet helps to ensure updated content by listing ideas for new guides and the last time changes were made to existing guides. Unfortunately, the success of tracking depends on its continued use by the content creators which has been an issue in the year since it was created.

Librarians continue to direct students to the subject guides during reference transactions and instruction sessions. Development of class specific guides and topic guides has also helped to tailor content to the needs of the population. Class guides often stem from specific assignments and embedded librarian experiences in online classes. Topic guides help to address issues such as bias and authority that would not otherwise be the main subject of a subject or class guide. It is important to note that these classifications are more for the benefit of the staff than the students.

### **Conclusion: UX Research is Never-ending!**

A final and ongoing challenge is the need for staff, as well as user buy-in. While the main audience of the subject guides and the website is the student population, staff also use the site. By sharing usability findings and subsequent site changes with staff on a regular basis, librarians were able to help them understand the reasons behind those changes and deal with the inevitable push back. Working with the university community by providing redirects from old guides and content to the new pages, as well as sharing usability study results has allowed the library to lessen the impact of and provide context for the website and subject guide changes. Sharing the library's work more broadly also opened access to campus grants for additional research.

Usability studies, assessment, and web development should not be one time endeavors. As follow up to the changes made in 2015, we completed four CI interviews (cognitive interviews) with a set of 10 tasks in Spring of 2016. At the time of this writing, these are still under review. Oregon Tech will also participate in the MISO survey (Measuring Information Service Outcomes, <http://www.misosurvey.org/>) in early 2017. To avoid assessment and survey fatigue, the library plans on delaying additional usability studies until after the survey. Ideally, a targeted survey or heat mapping will be the next step. Changing tactics, tasks, and asking questions in new ways will help uncover further needs for changes. 



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## Additional Resources

Presentation at Empirical Librarians Conference, North Carolina, 2/29/2016:  
<http://tinyurl.com/hl4qrvp>

Oregon Tech Subject Guides: <http://www.library.oit.edu/sp/subjects/index.php>

## Appendix: Focus Group Notes

These are researcher notes that have been compiled from ad-hoc notes taken during both focus groups. In the process of transcribing notes, both researchers began to structure their observations of the discussion thematically to begin to identify themes. While semi-structured, the notes below are still in a rough form before the application of thorough analysis.

### Compiled Focus Group Notes

Not going to research forever. I have a basic idea of what I want to say and then go find sources to support it or maybe change things

Think about what it used to be before the internet; Not that they had better tools. Need “how to use” or [to know] what is there to educate self on tools that exist.

#### ON WHERE TO SEARCH:

Find something you like, then research.

I assess what I know then go to general sources, like Wikipedia to start.

Wikipedia is a good source for background knowledge.

Some of the [Wikipedia] pages have a lot of sources at the bottom. Shop for sources. If you have to pay [hit a paywall] go to the library.

Use Google Scholar to find articles. Check the abstracts in Scholar then do a library search. Use library to request articles (only done this once).

I’ve never used Google Scholar

Wikipedia gives you an overview



[Wikipedia] gives you a broad list of places to start with all the references  
The sections [on Wikipedia] are easy to navigate  
Google Scholar gives you every scientific article out there. The abstract gives you background knowledge

ON VIDEOS:

[there are] videos for everything  
YouTube is good for when you can't concentrate  
I used YouTube to fix my laptop  
I used YouTube to hack into my iPod  
I use keywords to search YouTube

Look for less bias when trying to find how to do something. (gave an example that msdn website will only tell you how to use Microsoft, not necessarily the best product for what your are trying to do)

ON AUTHORITY:

More now I have to screen everything on the computer. I have found fake things, then taken them downstairs (indicates common areas of campus) and been told it is a fake.  
Found fake things  
A lot of checks need to happen  
Especially in medical  
Fraud  
Like the anti vaccine stuff  
I use google advanced search to eliminate .com  
[It would be good to] have a chart



# Your Personal Librarian: Connecting First-Year Students to the Library at Reed College

by **Erin Conor**  
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ERIN CONOR

Erin is the Performing Arts Librarian at Reed College. Her responsibilities include reference, instruction, and collection development for music, dance, and theater, as well as management of the Performing Arts Resource Center, a branch library and computer lab located in Reed's Performing Arts Building. An active member of the Music Library Association, Erin publishes and presents on issues relating to information literacy and music and performing arts librarianship.

## Introduction

Think back to your first year of college. How did you feel? Eager? Excited? Maybe also fearful, anxious about fitting in, making friends, or being successful? First-year students have a lot on their minds. It can be challenging to help them forge a meaningful connection with the library. Amidst the internal cacophony generated by the transition to college and the slew of departments and services competing for their attention when they arrive on campus, they may not realize that the library is here to help, too.

The Reed College Library has had a Personal Librarian program for our first-year students since the 2011 academic year.<sup>1</sup> We started our program after realizing that we were having a difficult time connecting with first-year students, for many of the reasons listed above. We were also inspired to start our program after realizing that our liaison model, in which each academic department at Reed is assigned a specific librarian as their subject liaison, might not be reaching students who had yet to declare a major. Finally, like many academic libraries, we were often facing slow traffic at our reference desk and were curious to explore alternative service models.

## Personal Librarians at Reed: How the Program Works

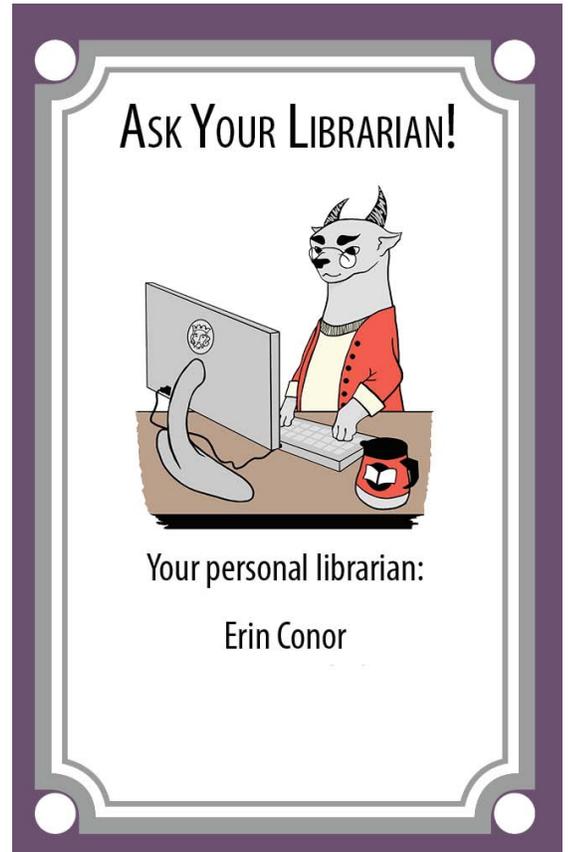
When planning our Personal Librarian program, we gathered ideas by investigating a number of similar programs existing at other colleges and universities at the time, such as those at Barnard College and Yale University. While we've made some tweaks to our program over the years, our overall goal has always been to keep our format simple and manageable. These basic elements have remained consistent:

- Every incoming first-year student is assigned a personal librarian. This librarian serves as a point of contact in the library and is available to answer any questions about using the library or doing research.

<sup>1</sup> Many Reed librarians, including myself, have provided leadership for our Personal Librarians program over the years. The wonderful Rachel Bridgewater, now at Portland Community College, deserves full credit for having initiated our program. Linda Maddux, our Science Librarian, is currently the coordinator of our Personal Librarian program.



- Prior to arriving on campus, each participating student receives a personalized mailing at his or her home address. The mailing introduces the student to his or her personal librarian and briefly explains what to expect from the program.
- Throughout the school year, personal librarians send their students a series of short emails highlighting library resources or services. These emails are timed to coincide with specific points in the curriculum or academic year, such as major paper due dates or semester breaks.
- During the school year, the library hosts at least one outreach event specifically for first-year students. These events are opportunities for students to connect with their personal librarian face-to-face, meet other first-years, and take a break from Reed's often intense academic environment. If they happen to learn something about the library while attending, all the better!
- Early in the fall of their sophomore year, participants receive a gentle farewell email from their personal librarian. This email includes information about the library's subject liaison program, which serves students who have selected a major.



Promotional artwork. Designed by Amy Stewart, Visual Resources Assistant.

Typically, all of the librarians who are involved in the activities of the library's Research Services department participate in the Personal Librarian program. This year, we have seven librarians acting as personal librarians; each works with around fifty first-year students.

### Results

Since starting the Personal Librarians program, we have tried various methods of assessment, including short surveys for participating students and the use of Google Analytics. We consider this program a success. Overall reference traffic generated directly in response to the Personal Librarian program has been relatively low. However, the program has been very enthusiastically received by parents, faculty, and administrators, as well as by those



students who do opt to use the service. As we've worked to make our program as helpful as possible, it has also reinvigorated our partnerships with other departments on campus, such as Academic Support Services and International Student Services.

Designing and sending our annual summer mailings remains a fair amount of work, but with a schedule for the school year and regular calendar reminders for participating librarians in place, maintaining the program year-to-year is not difficult. From our point of view, the work of running the program is well worth the goodwill it generates towards the library. Our Personal Librarians program has become as much a marketing program as it is a reference service.

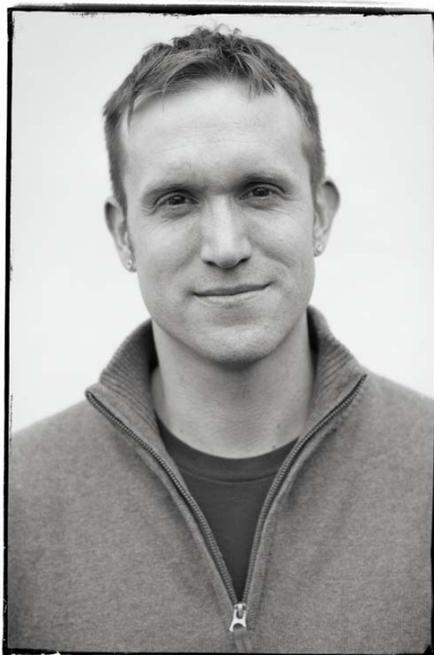
### **Conclusion**

The idea of assigning busy liaison librarians responsibility for outreach to fifty (or more!) first-year students may initially seem daunting or impractical. We've found, however, that with advance planning and careful coordination, this alternative service model can be successful. Our program has resulted in meaningful and long-lasting connections with first-year students. It has raised the profile of the library on campus, and it has inspired us to more carefully consider how we can most effectively tailor our reference services to Reed students of all levels. 



# My Librarian Knows My Next Good Book, Does Yours?

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*This is fantastic. When I got your email, I read it out loud to my husband because I was so impressed that (a) you understood exactly what I was asking for, and (b) the quality of the recommendations and explanations are amazing. My husband asked me how much I had to pay for that, and when I told him it was a free service of the local library, he was blown away.*

—PATRON RESPONSE TO A MY LIBRARIAN ANSWER

Many of our library patrons' needs (account information, computer help, you know the deal ...) are easy to recognize, but what happens if we take a look beyond the obvious? What if we offered an unexpected experience? Libraries have rolled out myriad options varying from unique collection lending, makerspaces, and other innovative and inventive ideas. In that spirit, Multnomah County Library pursued a new approach to readers' advisory: My Librarian. My Librarian is made possible by

a grant from the Paul G. Allen Family Foundation to The Library Foundation, a local non-profit dedicated to our library's leadership, innovation, and reach through private support.

Multnomah County Library's new and interactive readers' advisory service, My Librarian, began in 2014. It is designed to meet patrons where they are, in the channel where they prefer to interact. Its goal is to bring the warmth and connection of personal service into an online environment utilizing staff curating expertise. Curious patrons select from a menu of 17 librarians based on a shared passion for books, movies, or just intrigue. These characteristics are reflected in the My Librarian's self-created profiles highlighting personal interests and genre knowledge.

My Librarian offers a new connection for patrons who may not normally interact with library staff despite their regular usage of our services. Many patrons know what they want, but perhaps they don't know the scope of our services or haven't been asked the correct questions. This includes readers' advisory. Whether for themselves, children, or someone else in their lives, finding the "next great read" is not a new question for the library professional; but how it's answered has changed.

The My Librarian team aims to put an innovative, personalized, and accessible spin on reading suggestions. It was an experiment in selling ourselves as human beings with passions and interests, capable of offering better recommendations than a search engine algorithm. Coupled with an emphasis on increasing the quality of relationship building via readers' advisory, the program ultimately aimed to strengthen the connection between reader and librarian.

How does it work? The process is something many of us do, on or off the clock, on a daily basis, sometimes without even knowing. Patrons ask about finding a new book to read. A reference interview ensues. Hopefully, any pertinent information is obtained. We respond with information to fulfill their request. Simple enough, right? However, what if there was a more personalized way of patron interactions?



My Librarian does not live on paper. Patrons choose from a variety of staff profiles with a range of interests from the Multnomah County Library homepage, [www.multcolib.org](http://www.multcolib.org). The brief online form asks them what they like, don't like, and how they prefer to communicate. These options include email (the most popular), in person, video, and phone. After receiving their information, the selected staff person finds three or more personalized read-alikes utilizing a variety of tools and knowledge and responds within a 48-hour period. As per best practices, patrons are invited to let us know what they think and are encouraged to use the service again at the end of each email or conversation.

The requested feedback ranges from radio silence to raves (as seen at the beginning of this article). It's not an expectation from the My Librarian point of view, but is always appreciated. Readers' advisory is a fun and rewarding process as well as an invitation to build the patron/librarian relationship, one of the goals of all library service. That's enough about who we have heard from, what about the silent patrons? How did we know if they liked us—really liked us—or not?

One of the frustrations of virtual service is the lack of immediate feedback that is intrinsic during in-person interactions. Readers' advisory requires a certain amount of vulnerability from the patron, and the fear of being judged for one's reading tastes can be negated through the anonymity of the Internet. My Librarian recommendations are provided with warmth and lack of judgment, offering assurance of their trust. Despite these efforts, many answers still received no response. We needed to know how the user experience was, so we followed up on their experience.

To find out what the My Librarian patrons thought about their experience with the service, their comments, or "love letters" as we refer to them, are a good place to start. However, as reaffirming as they are, they represent a small portion of the My Librarian users. In an effort to reach out to a large number of My Librarian users, we contacted additional patrons who used the service with a survey about their experiences. From that pool, a smaller group was chosen for a more detailed survey about their entire experience from entry point to final thoughts on improvements. These results yielded high satisfaction rates and offered paths for future action as the My Librarians continue.

Now what? It's been almost two years since the My Librarian team has been offering book suggestions. For the patron base utilizing this program, the effect is clear and direct. They want book recommendations, and they get them. However, the reach has grown beyond the readers' advisory transaction. The staff making up the My Librarian Team is spread across the entire Multnomah County Library system. This locational diversity extends the reach of expertise and guidance for readers' advisory for the system as a whole. The staff members serve as internal experts, coaching staff on the provision of service in order to raise the bar for readers services system wide.

Let's face it. The reality of today's library is recognizing that our patron's needs evolve faster than we can keep up. Innovation that serves the library user requires many components for success, and the relationship library professionals can build via personal connections is a pivotal factor. My Librarian reaches out with book recommendation in hand, but it is more than a few titles. It's about highlighting and utilizing staff expertise, looking ahead, and most importantly, engaging the most important aspect of our work: the patron experience. 



# LEADing the Way: UX IRL @ OSU

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Meggie Wright is the new OER Librarian at Lane Community College, where she works on campus-wide programs on open pedagogy, Open Educational Resources (OERs), and textbook affordability. Previously, Meggie provided reference services at Linn Benton Community College and Oregon State University. She is also an avid gardener and a proud cat mom.



VALERY KING

Valery King has worked at OSU Libraries since 1987, first as a library technician in cataloging and maps, and currently as Government Information and Business Librarian, which includes duties as the Federal Depository Library Program coordinator since 2002. She has been active in OLA for many years, particularly in DIGOR. Her writing and presentations focus on reference and virtual reference service, and government information resources.

## Introduction

Oregon State University Libraries and Press has reorganized its circulation, reference and building management services into a new department, focusing directly on the experience of library users. The Library Experience and Access Department (LEAD) was designed to meet evolving needs with access to user-focused, proactive, and flexible services and spaces that enrich learning, teaching and research. Our new organization gives us the opportunity to explore user experience in a comprehensive, holistic way that includes our physical space. In our first year, LEAD has investigated ways of evaluating and revitalizing in-person services, through signage and concierge service projects and collaboration with students in the OSU Department of Design and Human Experience.

## Inception

The ways that students use the library have changed significantly over the years, and traditional academic library service models and how we present and organize our public spaces



have become less relevant to our users. For us to be true to our core values of access and service, we need to address these changes proactively.

In 2015, The Valley Library at Oregon State University took a major step in this direction when it formed a new department: the Library Experience and Access Department. LEAD was designed and charged to meet the evolving needs of our patrons with access to user-focused, proactive, and flexible services and spaces that enrich learning, teaching and research. As its name suggests, LEAD primarily addresses services and issues affecting user experiences in the Valley Library and includes the Circulation Desk, Information Desk (reference and informational services), and Building Maintenance. The formation of LEAD was in many ways a break with tradition, as these services had previously been located in three separate departments.

The LEAD configuration grew out of several strategic issues identified in the Oregon State University Libraries and Press Strategic Plan 2012–2017. The very first goal of the plan called for us to “Reimagine the Learning and Service Environment.” The new arrangement would encourage greater cooperation and collaboration between our public-facing library services while striving to meet the vision of “engaging spaces, exceptional service, superior access.”

### **Methodology**

The library has for several years been using various methods to measure patron satisfaction, such as patron surveys, focus groups, and user experience studies. The approach used by LEAD built upon much of the information already gathered through these methods. We reviewed what progress we had already made on the Strategic Plan goal so that we could determine where to place our energy in developing our services.

Soon after the department’s formation, LEAD staff members participated in an exercise used by marketers and UX designers: identifying the “touchpoints” (where and how people interact) between the library and the users. The staff broke into small groups to identify the places where we and our patrons “encounter” each other and look for ways to improve these interactions. We came together to compare our lists, and we were amazed at the dozens of touchpoints we were able to identify.

We found that many of our touchpoints involved wayfinding, or how users find their way through a space. Like many academic libraries, the Valley Library is a large, multi-level structure, encompassing approximately 305,000 square feet. Due to the size, complexity, and the number of dedicated spaces available, navigating the building poses a challenge for patrons and visitors. The building’s existing signage was installed during a remodel in 1999. As our library spaces have evolved away from their prior uses, the signage can now potentially hinder our patrons in successful wayfinding. Desk staff shared that many users seem confused by the current signage and that our service counters spend a considerable amount of time helping users with finding locations in the library; a review of our desk statistics found that both the Information Desk and Circulation Desk field a large proportion of directional questions.

### **First-Year Projects**

Based on this exercise and information collection, several touchpoint issues were identified at the library. Most could be successfully addressed by smaller teams rather than requiring the attention of the whole department. However, wayfinding emerged as the primary focus for LEAD as a department in its first year.



At about this time we connected with Professor Seunghae Lee of Oregon State University's School of Design and Human Environment (DHE) in the College of Business, an expert on wayfinding. She had recently published a case study on interactive maps that identified common wayfinding challenges, using the Valley Library as her subject (Lee, Kim, & Platosh, 2015). Professor Lee made a presentation to library staff and provided us with a fresh take on the wayfinding challenges in our building. She also offered ideas for cost-free or inexpensive changes that could provide immediate improvement to our users and gave some indications of more large-scale options.

#### SIGNAGE & WAYFINDING

The new LEAD Signage and Wayfinding working group was charged with exploring wayfinding in relation to the environment and to individual characteristics of patrons, such as their familiarity with the building. The ultimate goal of the workgroup is to determine the main issues users have in finding their way in our library and come up with some ideas to address them. So far, the process has included reviewing literature, holding group discussions, talking to stakeholders, investigating other campus buildings to discover how they handle their signage, and visiting other libraries as the opportunity presents. User testing of our signage is the goal for the future.

The working group conducted a signage inventory and began a phased approach of replacing inaccurate or misleading signs with temporary ones. More permanent signage will coincide with other upcoming changes being considered for the main floor public spaces. The group is currently working with a Senior Computer Sciences Capstone course to develop an Interactive Study Space Map and Wayfinding Tool.

#### CONCIERGE SERVICE

One idea that came up in the LEAD touchpoint sessions and staff retreat was a "concierge service," which involved setting up a temporary station in a prominent place to help orient new users to their library. Staffed during the busiest hours at the library (determined by statistics from the previous year), the concierge could help users with quick directional or technical questions while referring circulation and reference questions on to the appropriate desk. A concierge service offered the possibility of solving multiple issues with wayfinding in the Valley Library. A staff member posted just inside the entrance would be an obvious first touchpoint for users, while also reducing the number of users that might be bounced between service desks after standing in the wrong line. This would be a low-cost, low-effort solution with a potentially high impact.

Library Administration gave the go-ahead to set up the concierge service as a pilot project to coincide with the first three weeks of classes in September 2015. An old podium was repurposed, with the addition of wheels, brochure racks, and an "ASK HERE" sign, as a mobile concierge station. Because of the nature of the concierge service as a directional and referral touchpoint, we proposed that library employees from any department would be able to staff the service with little or no training. An email was sent out to all library employees asking for volunteers to sign up for one-hour shifts during the first three weeks of classes, and staff response was positive and enthusiastic.

Frequently used informational handouts from the Circulation and Information Desks (campus maps, printing instructions, and the like) were provided at the concierge station,



as well as a clicker for recording the number of questions and pen and paper for recording questions and comments from users. The majority of transactions were simple directional information or questions about printing; more involved questions were referred to an appropriate service point (generally the Circulation Desk, Info Desk, or Computer Help Desk).

By the end of week three, the concierge service had answered 1382 questions. Not only was the concierge a useful service to new library users, but it also gave LEAD a clearer vision of what people were looking for and having difficulty finding. The questions from users recorded by the volunteers are being reviewed and used to inform our department's continued work on wayfinding in the library.

#### DHE COLLABORATION

Our association with Professor Lee has led to further UX opportunities for the library. At her suggestion, and with our enthusiastic approval, the library became the subject for a case study by her DHE students. Small groups of students were assigned to one of four categories of library service or spaces. After an orientation and classroom discussion with the head of LEAD, Beth Filar-Williams, the student groups conducted interviews with library staff and studied the spaces and how they were being used.

Their final reports, including their informed and researched recommendations and suggestions for improvements, were made available to us. These reports are an invaluable resource for the LEAD department, in large part because they are authored by our primary user group: our students. The Signage & Wayfinding working group members are using the DHE student reports to identify problems in the library and potential solutions, as well as prioritizing student suggestions through a high effort/low effort, high impact/low impact evaluation. Suggestions from the DHE students are also being considered in the library's current renovation of the Information Desk and Learning Commons area.



*Before:* the large Information Desk from the library's 1999 renovation.





*After:* remodel completed with new custom desks that are smaller and more accessible than the original.

### **Next Steps for LEAD**

We've learned a lot over the past year! We're looking forward to applying what we've learned about our users' needs and what they would like from the library, as well as additional ways of using UX techniques in our work. Among things already in the works for the coming year:

#### CREATION OF A CROSS-DEPARTMENTAL UX EXPLORATORY TEAM

A UX Exploratory Team was formed to determine what projects would benefit from collaboration across library departments, identify what other usability testing is being performed within the library, and investigate what is happening across campus. This team will also look at the usability of the library website.

#### RENOVATION OF THE INFORMATION DESK AND LEARNING COMMONS

With a gift from a generous donor, it has been possible for us to replace our large, intimidating information desk with a smaller one that allows for easier collaboration between staff and users. We have completed demolition and are waiting for the new desk to arrive. Requests from Professor Lee's DHE students for more whiteboards and collaborative work areas were considered when picking out the new Learning Commons furniture.

#### CO-LOCATION OF THE CIRCULATION DESK AND INFORMATION DESK

This could go a long way toward solving one of our most common wayfinding issues. We are currently gathering information from staff and library users to identify what would be involved with providing reference and circulation services from one spot.



#### SIGNAGE IMPROVEMENTS

The original design of the Valley Library had signs hung from the ceiling, which are often missed by users. There are also many support columns throughout the building that often block visibility. We are trying out using these columns as signposts by applying vertical, easy-to-read text to them, which turns an issue into a feature.

#### COLOR COORDINATING LIBRARY FLOORS

Using color as an aid to wayfinding has been a focus of designers for some time, with studies showing that people naturally use color to sort and group objects. We are currently investigating ways to color coordinate our six floor building, to make it easier for our users to identify where to find services, collections, and each other! This is another suggestion from the DHE class teams.

#### CROSS-DEPARTMENTAL PARTNERSHIPS

Our underused newspaper room on the main floor is being repurposed for a Current Issues Reading Room, in partnership with the Teaching and Engagement Department and Collections librarians. LEAD members are also working with M. Brooke Robertshaw, OSU's Assessment Librarian, on the evaluation of various projects (one collaboration being a poster session at the recent OLA Conference on the Concierge pilot).

### Conclusion

With student needs and preferences changing fast, university libraries must also evolve to stay useful and relevant. New services are being considered as old services are re-evaluated. The Learning Experience and Access Department seeks to meet our users' needs in meaningful ways, using all the various communications and data-gathering tools at our disposal. The usability of our physical spaces is one large piece of the UX puzzle that we are excited to be putting together as OSU Valley Library's LEAD department. 

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# OLA Quarterly Publication Schedule 2017

The *OLA Quarterly (OLAQ)* is the official publication of the Oregon Library Association. The *OLAQ* is indexed by *Library Literature & Information Science* and *Library, Information Science & Technology Abstracts*. To view PDFs of issues, visit the OLAQ Archive on the OLA website. Full text is also available through H.W. Wilson's *Library Literature and Information Science Full Text* and EBSCO Publishing's *Library, Information Science and Technology Abstracts (LISTA) with Full Text*.

Each issue is developed around a theme determined by the Communications Committee and Guest Editor(s). To suggest future topics for the *OLA Quarterly*, or to volunteer/nominate a Guest Editor, contact the OLAQ Coordinator.

| Vol./No.                      | Theme                     | Deadline         | Pub. Date      | Guest Editor   |
|-------------------------------|---------------------------|------------------|----------------|--|
| Vol 22 • No. 4<br>Winter 2016 | REFORMA<br>Oregon Chapter | January 15, 2017 | March 15, 2017 | Martín Blasco<br>Outreach Librarian for Latino &<br>Multicultural Services,<br>Washington County Cooperative<br>Library Services |

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